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Management from the NOVA - School of Business and Economics

# **A CSR Communication Strategy for Ibersol: fighting hunger in Portugal**

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## **Abstract**

The purpose of this Work Project is to develop a Corporate Social Responsibility Communication Strategy for the restaurant group Ibersol, more specifically for the brands Pizza Hut, Burger King, Pans & Company, KFC and Pasta Caffé. The proposed CSR Strategy includes Cause-Related Marketing, Corporate Fundraising and Employee Volunteering initiatives, which aim at fighting hunger in Portugal while enhancing the brand image of Ibersol as a group and of each brand individually.

Secondary and primary researches were conducted to ensure the feasibility of the initiatives, and their ability to successfully meet the defined communication and fundraising goals.

Keywords: Corporate Social Responsibility, Communication, Ibersol, hunger, corporate image.

## Table of Contents

<b>1</b>	<b>Executive Summary .....</b>	<b>4</b>
<b>2</b>	<b>Literature Review.....</b>	<b>5</b>
2.1	Corporate Social Responsibility .....	5
2.2	Corporate Social Initiatives .....	6
2.2.1	Cause-Related Marketing .....	6
2.2.2	Corporate Fundraising .....	6
2.2.3	Employee Volunteering.....	7
2.3	Digital Marketing.....	7
<b>3</b>	<b>Situation Analysis.....</b>	<b>8</b>
3.1	Methodology .....	8
3.2	Category Momentum.....	8
3.3	Prosumer Momentum.....	10
3.4	Brand Momentum.....	11
3.5	Insights and Strategy .....	15
<b>4</b>	<b>CSR Communication Plan.....</b>	<b>17</b>
4.1	Marketing Objectives and Budget.....	17
4.2	Target Audience .....	17
4.3	Communication Objectives .....	18
4.4	Positioning .....	18
4.5	Implementation Plan .....	19
4.5.1	Strategy and Initiatives testing .....	20
4.5.2	Corporate Social Initiatives .....	22
4.5.3	Media Strategy.....	24
4.6	Campaign Tracking and Evaluation.....	25
<b>5</b>	<b>Conclusions .....</b>	<b>26</b>
<b>6</b>	<b>Limitations and Recommendations .....</b>	<b>27</b>
<b>7</b>	<b>References .....</b>	<b>27</b>
<b>8</b>	<b>Appendix .....</b>	<b>30</b>

## **1 Executive Summary**

The present Work Project, integrated in the Field Lab – Communication Agency with Fuel (Havas Worldwide)<sup>1</sup>, aims at developing a Corporate Social Responsibility (CSR) Communication Strategy for the Ibersol group.

The briefing from the agency Fuel suggested the design of an integrated strategy for five brands of the Ibersol group, namely Pizza Hut, Burger King, Pans & Company, KFC and Pasta Caffé, where only one social cause would be supported. The goal of the strategy is to improve brand image<sup>2</sup> of the corporate brand, and of every brand individually.

The project starts with a Literature Review on CSR, Corporate Social Initiatives and Digital Marketing. Thereafter, the Situation Analysis is developed, under the Creative Business Idea (CBI)<sup>3</sup> framework. This analysis consists of an overview of the Category, the Prosumer<sup>4</sup> and the Brand, and was built on secondary data and semi-structured in-depth interviews.

Based on the Insights and Strategy that resulted from this analysis, it was designed a CSR Communication Plan for the selected Ibersol brands, which includes three Corporate Social Initiatives: Cause-Related Marketing, Corporate Fundraising and Employee Volunteering. The strategy emphasizes digital tools, because the literature, secondary data and my own research pointed out that millennials<sup>5</sup>, the main target of the restaurants, are highly interested in CSR and in digital. It is noteworthy that both Fuel and Ibersol were consulted during the different steps of the process, and that the strategy was tested through interviews, a focus group and a questionnaire of 241 respondents.

The Annex contains additional information that complements the present document.

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<sup>1</sup> Formerly known as Euro RSCG group, Havas Worldwide is one of the largest communication agencies worldwide. The Field Lab comprises developing a communication strategy for one of Fuel's clients, from which it was chosen Ibersol.

<sup>2</sup> Brand image is defined as the "perceptions about a brand as reflected by the brand associations held in consumer memory." (Keller, Apéria and Georgson, 2011:58).

<sup>3</sup> CBI is a process designed by Havas to generate ideas that contribute to the growth of client's business.

<sup>4</sup> Prosumers are consumers with great power of influence and attention to trends.

<sup>5</sup> There are no precise dates for when the Millennial Generation, also called Gen Y, was born. It was decided to follow the age range suggested by Euromonitor International, i.e., 18-26 years old in 2012.

## **2 Literature Review**

### **2.1 Corporate Social Responsibility**

Different definitions of Corporate Social Responsibility coexist in the literature, nevertheless, most imply Carroll's 1979 and 1991 pyramid of CSR, which includes economic, legal, ethical and philanthropic responsibilities (Carroll, 1979, 1991; Galbreath, 2010; Pedersen, 2010; Snider et al., 2003; Swaen and Chumpitaz, 2008); as well the Triple Bottom Line concept, which consists of three Ps: People, Planet, and Profit (Davis, 2005; Pedersen, 2010; Porter and Kramer, 2006).

The most recent definition of the European Commission (2011:6) describes CSR as "the responsibility of enterprises for their impacts on society", where every stakeholder<sup>6</sup> is considered. Proponents of the shareholder theory, as Milton Friedman (1970), defend that manager's role is to maximize shareholder value (Smith, 2003). Differently, the advocates of CSR defend the stakeholder theory (Freeman, 1984), which states that managers are ought to go beyond what is legally expected from them and consider all stakeholders' interests.

The reasons why companies engage in CSR activities are manifold. From these the literature highlights consumer's growing interest in responsible products and services (Heslin and Ochoa, 2008), reputation and image (Arendt and Brettel, 2010; Jahdi and Acikdilli, 2009; Porter and Kramer, 2006, Sen and Bhattacharya, 2003), and that CSR activities can lead to employee-company (Kim et al., 2010) and consumer-company identification (Lichtenstein et al., 2004; Sen and Bhattacharya, 2001, 2003).

Investing in CSR can therefore become a valuable and sustainable source of competitive advantage (Chahal and Sharma, 2006; Lichtenstein et al., 2004; Porter and Kramer, 2006).

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<sup>6</sup> Stakeholders include any "person or group that have, or claim, ownership, rights, or interests in a corporation and its activities, past, present or future." (Clarkson, 1995:106).

## **2.2 Corporate Social Initiatives**

According to Kotler and Lee (2005) there are several means companies can use to meet their CSR goals and support worthy causes<sup>7</sup>. Those that are applicable to the project were selected and are presented in the literature review below.

### **2.2.1 Cause-Related Marketing**

C-RM is “characterized by an offer from the firm to contribute a specified amount to a designated cause when customers engage in revenue-providing exchanges (...)” (Varadarajan and Menon, 1988:60). Studies confirm that C-RM leads to a win-win-win situation for the company, the consumers, and the cause, where brand image is enhanced (Chéron et al., 2012). The most explored success factor of a C-RM campaign is the fit between the cause and the company/product (Chéron et al., 2012; Hill and Becker-Olsen, 2005; Hoeffler and Keller, 2002; Simmons and Becker-Olsen, 2006; Varadajan and Menon, 1988).

### **2.2.2 Corporate Fundraising**

Corporate Fundraising or Cause Promotions arises when a company provides funds and/or promotes fundraising activities to support a social cause, which often results in strengthened brand positioning and image (Kotler and Lee, 2005), together with employee retention (Lindahl, 2010).

More specifically, crowdfunding is an emerging phenomenon whereby financing for financial return or a charitable cause is Internet-based, usually via a crowdfunding platform (de Buysere et al., 2012; Hemer, 2011; Ordanini, 2012). Millennials are crowdfunding’s biggest audience (Klein, 2011).

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<sup>7</sup> The six initiatives proposed by the authors are Cause-Related Marketing, Cause Promotions, Community Volunteering, Corporate Social Marketing, Corporate Philanthropy and Socially Responsible Business Practices.

### **2.2.3 Employee Volunteering**

Employee or Community Volunteering takes place when firms encourage employees to volunteer on company time (Kotler and Lee, 2005). Volunteering is perceived as one of the most genuine initiatives (Kotler and Lee, 2005; Muthury et al., 2009) and has positive effects on employee satisfaction, retention and skills, in addition to corporate image and reputation (Basil et al., 2009; Booth, Kyoung and Glom, 2009; de Gilder, Schuyt and Breedjik, 2005; Kotler and Lee, 2005; Pajo and Lee, 2011; Peterson, 2003, 2004). It is especially valued by millennials (2007 Deloitte Volunteer IMPACT survey).

## **2.3 Digital Marketing<sup>8</sup>**

Digital Marketing is “the use of the Internet/Web and related information technologies to conduct marketing activities.” (Krishnamarthu, 2005:52).

Literature on digital marketing often mentions millennials, as they prefer digital strategies to others (eMarketer, 2012; Smith, 2011, 2012).

Today we are witnessing a shift “to an era of personalized and participatory media” (Wertheim and Fenwick, 2008:26), where the co-creation with consumers (Hanna, Rohm and Crittenden, 2011; Wertheim and Fenwick, 2008), a more focused targeting (Gupta, Kristen and Clayton, 2010; Shabazz, 2004; Taylor, 2009; Wertheim and Fenwick, 2008), better engagement (Shabazz, 2004; Taylor, 2009) and real-time measurement (Wertheim and Fenwick, 2008) are possible. The fragmentation of media, the empowerment of consumers and the Zero Moment of Truth (Edelman, 2010) have led to a change in the Consumer Decision Journey (Court et al., 2009; Edelman, 2010). Marketers should now target every touch point with the brand and align traditional and online marketing (Kotler et al., 2012) to generate word-of-mouth<sup>9</sup>.

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<sup>8</sup> Although there is no obvious link between Digital Marketing and the previous literature review, it was considered important to stress the topic, as it influenced some of the options taken concerning the campaign.

<sup>9</sup> WOM or buzz marketing is extremely effective as consumers consider their peer’s opinions the most credible source of information (Nielsen, 2009; Sprague and Wells, 2010).

### **3 Situation Analysis**

#### **3.1 Methodology**

Among the processes to generate strategic ideas used by Havas Worldwide, the CBI framework was chosen and adapted to CSR, since it is the most consistent with this project. To develop a CBI one must begin with the analysis of the category, the brand and the prosumer momentums. Afterwards, the intersections between these momentums are explored, from which results a strategic idea.

In order to build the Situation Analysis, external<sup>10</sup> and internal<sup>11</sup> secondary data were collected and analyzed. To fill the information gaps that were detected in secondary data, it was felt the need to undertake primary research. Informal interviews were conducted to employees of each of the 5 restaurants in the Shopping Centers Colombo, Dolce Vita Tejo, and El Corte Inglés; as well as an interview to Pans & Company's Senior Brand Manager Gustavo Mendes. Finally, 25 semi-structured in-depth interviews were conveyed to consumers of the 5 restaurants (Exhibit 2 of the Annex). Qualitative research was carried out at this point, to understand the consumer's perceptions and attitudes towards the category, the brands and social responsibility. The interviews were performed to Ibersol's primary target, millennials, living in Portugal for at least 2 years, who visit shopping centers regularly and have been in one of the restaurants at least twice in 2012.

#### **3.2 Category Momentum**

The Ibersol group plays in the foodservice<sup>12</sup> industry, more specifically in the fast food segment. In Portugal, there has been a 14% decrease in spent on eating out (7.17 billion in 2004 to 6.81 in 2008), however, the fast food segment contradicts this tendency, rising to a

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<sup>10</sup> Euromonitor International, Ipsos Apeme, Marktest, Nielsen, NovaExpressão, The Consumer Lab, and Warc.

<sup>11</sup> Ibersol semiannual, annual and sustainability reports, as well as Ibersol and competitor's websites.

<sup>12</sup> Foodservice is "the sale of food and drinks for immediate consumption either on the premises from which they were bought, or in designated eating areas shared with other foodservice operators, or in the case of takeaways transactions, freshly prepared food for immediate consumption." Retrieved from <http://www.reportlinker.com/p0360150-summary/Foodservice-Global-Industry-Almanac.html>



value of 715 million in 2010 and with forecasted sales of 3 million in 2015<sup>13</sup>. Nevertheless, the average number of visits to quick-service restaurants in Portugal declined from 5 times a month (2010) to 3.6 (2011). Half the visits are to restaurants located in Shopping Centers<sup>14</sup>.

The McDonalds Corp., Ibersol group, Starfoods, and Multifood group are the largest competitors in the category and together have 80% of the restaurant market in Portugal. Additionally, take away, delivery and retailers are becoming strong competitors of the food court, due to lower prices and convenience<sup>15</sup>. As a matter of fact, convenience, health and gourmet are the key concepts of brands that have recently entered the market, as it is the example of H3<sup>16</sup>.

McDonalds is the leading player of the category and a role model in regards to social responsibility. As it is considered the restaurant of children, both communication and CSR activities are directed to this target, mainly via the Ronald McDonald Foundation. McDonalds also has a strong commitment towards the development of employees.

Starfoods group manages Companhia das Sandes (sandwiches), Loja das Sopas (mainly soups) and Fresc Co. (self-service diversified meals). The group has a partnership with Fairtrade<sup>17</sup>.

Multifood comprises Vitaminas (healthy and light meals), Capri (Mediterranean food), Wok to Walk (Asian food), Milano (pastry) and Yo!Sushi (sushi), being health the key theme in the group's communication. Moreover, Multifood is in the "Best 100 companies to work for" ranking from the magazine Exame<sup>18</sup>.

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<sup>13</sup> Euromonitor International. 2011. *Fast Food in Portugal*.

<sup>14</sup> Ipsos / Apeme. 2011. *Estudo de Imagem e Posicionamento*.

<sup>15</sup> There is no data available on market shares of the restaurant industry in Portugal. This is the only information concerning competition that the Senior Brand Manager of Ibersol interviewed could disclose.

<sup>16</sup> Euromonitor International. 2011. *Fast Food in Portugal*.

<sup>17</sup> <http://www.fairtrade.org.uk/>

<sup>18</sup> [http://downloads.expresso.pt/expressoonline/PDF/MelhoresEmpresasTrabalhar\\_rankings.pdf](http://downloads.expresso.pt/expressoonline/PDF/MelhoresEmpresasTrabalhar_rankings.pdf)

### 3.3 Prosumer Momentum

Euromonitor International's studies on Consumer Foodservice (2011) and Fast Food in Portugal (2011) show that consumers are substituting full-service restaurants for fast food and take away services due to money and time constraints. In fact, people have less time to spend, and the little they have, is spent online: ownership of broadband internet-enabled PCs is expected to reach 79.1% of households and 99.4% of the population will own a mobile phone by 2020<sup>19</sup>. 59% of users in social networks are 18 to 34 years old<sup>20</sup>.

There is a growing concern for health<sup>21</sup>, however, more than half of the Portuguese eat regularly in fast food restaurants, being the 15 to 34 years old segment the one that does so the most (79%)<sup>22</sup>. The TGI study also points out that Portuguese consumers expect companies to engage in CSR-related activities, and value the ones that are concrete, close to them and with short-term results.

As abovementioned, the Millennial Generation is the target Ibersol is more focused on<sup>23</sup>. In addition to being socially and environmentally conscious (Cone Inc., 2006), technology plays a central role in their lives, as they are used to share and connect everything (Smith, W., 2011). Their power to influence and create buzz around a brand make them "the hottest demographic" for marketers<sup>24</sup>.

The 25 interviews undertaken (Exhibit 2 of the Annex) confirm what the literature and secondary data suggested: 25 out of 25 interviewees have donated to charity and/or did volunteer work, philanthropic activities are an important part of their lives, and they are willing to help causes through the Internet. Consumers generally describe the restaurants as

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<sup>19</sup> Euromonitor International. 2010. *Consumer Lifestyles – Portugal*.

<sup>20</sup> Nova Expressão SPGS. 2010. *Um dia nas nossas vidas*.

<sup>21</sup> The Consumer Intelligence Lab. 2011; Euromonitor International. 2011. *Fast Food in Portugal*; Euromonitor International. 2011. *Consumer Foodservice in Portugal*.

<sup>22</sup> Target Group Index (TGI). 2011. *Ciclo de Vida dos Consumidores Portugueses*.

<sup>23</sup> The target of Ibersol's restaurants is very broad, however, after interviewing Pans & Company's BM and employees, as well as analyzing public information, it was concluded that millennials are currently the most important target group.

<sup>24</sup> Euromonitor International Ltd. 2011. 11<sup>th</sup> Edition. *World Consumer Lifestyles Databook*.

‘tasty’ (10 respondents), ‘affordable’ (11) and ‘a place to go with friends’ (18), and have positive associations towards the restaurants, although unhealthiness was pointed out very often (8). Also, consumers choose the restaurants by impulse (19), as they are in a shopping center and need a quick and affordable solution. Convenience (9), the tradeoff quality/price (11), and the friendly environment (8) appear to be the main reasons behind purchase.

### 3.4 Brand Momentum

Ibersol – SPGS, SA was founded in 1989 in Porto and is today the largest restaurant group in Portugal (Exhibit 3 of the Annex). The group represents a large share of the food court in shopping centers with 312 owned stores in Portugal and 77 in Spain, according to company reports (Exhibit 4 of the Annex). Nowadays, Ibersol manages Pizza Hut, Burger King, Pans & Company, KFC and Pasta Caff , as well as other brands and services<sup>25</sup> beyond the scope of this project. It currently employs more than 5.000 people in the Iberian Peninsula and has recently opened a KFC restaurant in Luanda.

In the first half of 2012, the consolidated turnover in Portugal was of 81.6 million euros, a decrease in 12.6% relative to the same period of the previous year<sup>26</sup>, which reflects the fall in private consumption and the increase in the VAT rate<sup>27</sup>.

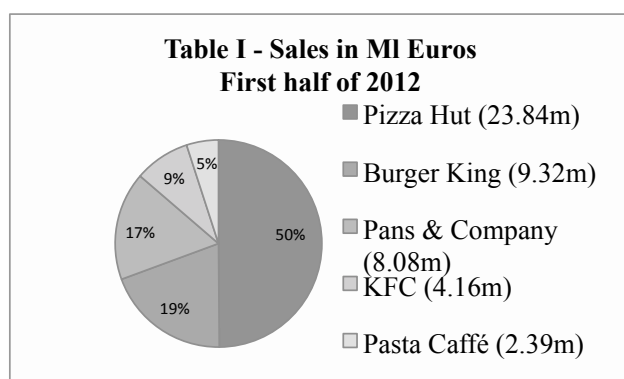


Table I represents the sales share of each of the five restaurants, totaling 47.8 million in the first semester of 2012, a 15,5% decrease relative to the previous year (Exhibits 5 and 6 of the Annex). Pizza Hut is the leader in sales of the five restaurants, and Pasta Caff  represents only 5%.

<sup>25</sup> Pizza M vil,   Kilo, Bocatta, Sol, units in airports, caff  kiosks, concession spaces and catering services.

<sup>26</sup> Ibersol. 2012. *Results – 1<sup>st</sup> half of 2012*.

<sup>27</sup> Ibersol. 2011. *Annual Report*.

Table II - Overview of the brands<sup>28</sup>

Brands	Positioning	CSR activities	Other activities
 Sub-segment: Pizza	<ul style="list-style-type: none"> <li>- Restaurant, delivery and take away pizzas with a variety of ingredients and types of pasta;</li> <li>- “Muito para além da pizza”;</li> <li>- “Fun and Friendly”</li> </ul>	<ul style="list-style-type: none"> <li>- Organizes contests with Kidzania, Jardim Zoológico and Sea Life</li> </ul>	<ul style="list-style-type: none"> <li>- Hot Junior program (offer of a meal to children accompanying parents), Crown Pizza and other promotions;</li> <li>- Present in summer festivals (Optimus Alive, Marés Vivas, Paredes de Coura)</li> </ul>
 Sub-segment: Hamburger	<ul style="list-style-type: none"> <li>- Grilled customizable hamburgers;</li> <li>- “Have it your way” concept</li> </ul>	<ul style="list-style-type: none"> <li>- Open Kitchen program;</li> <li>- Uses recycling paper</li> </ul>	<ul style="list-style-type: none"> <li>-</li> </ul>
 Sub-segment: Sandwich	<ul style="list-style-type: none"> <li>- Specialist in hot, cold and grilled sandwiches;</li> <li>- “Freshness and creativity”</li> </ul>	<ul style="list-style-type: none"> <li>-</li> </ul>	<ul style="list-style-type: none"> <li>- Virtual discount card</li> </ul>
 Sub-segment: Chicken/ American Food	<ul style="list-style-type: none"> <li>- Fried chicken;</li> <li>- “Taste the difference”;</li> <li>- “Saudável, saboroso, so good.”</li> </ul>	<ul style="list-style-type: none"> <li>- Junior Achievement program (talks about entrepreneurship in schools);</li> <li>- Right Arm program (students can follow workers for a day)</li> </ul>	<ul style="list-style-type: none"> <li>- Champs Management System (guidelines employees should follow)</li> </ul>
 Sub-segment: Pasta/ Italian food	<ul style="list-style-type: none"> <li>- Informal, young, Italian</li> </ul>	<ul style="list-style-type: none"> <li>- Employee training program</li> </ul>	<ul style="list-style-type: none"> <li>- Thematic events in special days, such as Valentine’s or Mother’s Day</li> </ul>

It is worth mentioning that the communication vehicles most used by the brands are Facebook and Point of Sale merchandising material. Additionally, Pizza Hut and Burger King advertise on TV, and the former also communicates through outdoors.

<sup>28</sup> Ibersol. 2011. *Annual Report*; interviews to a Brand Manager of Ibersol and to the employees.

Table III - CSR programs and Communication<sup>29</sup>

Field	Name	Description	Partnership	Results
<b>Health</b>	- “Viva Bem” <sup>30</sup>	- Nutritional information; - “Kids Bike Tour” and “Comer bem dá saúde e prémios” campaigns	-	- 3000+ materials with nutritional information; - Offering of balanced meals, specially for the younger targets
<b>Hunger</b>	- “Holding hands for Caué”	- “With just 0.20 euros anyone can save a hungry child”; Ibersol matched the donations	- AMI / Nutrition Project “Hand in hand for Caué”	- Raised 150.000 euros in 2009; the program is still ongoing
<b>Employee development</b>	- “Ibersol School”; - Team sport activities	- Career building program for employees	- Liga Portuguesa Contra o Cancro and other charities	- 50 hours of training per employee (2009)
<b>Education and Community</b>	- “Porto de Futuro”	- Promoting healthy eating habits; - Offering education and training; - Management of school canteens	- Porto Town Hall, school groupings, companies and the North’s Regional Board of Education	- 1500 hours of training from 2009 to 2011; - 2-days internships; - Donated 6600kg of food
<b>Environment</b>	- E2Trade project	- Waste management; - Rational use of energy	-	- Reduction in the electricity, gas and water consumption

Furthermore, the company frequently donates to several Portuguese institutions, such as Acreditar and APAV. Ibersol was the first commercial catering group in Portugal to receive the ISO 22000 international standard of food certified by APCER, and an honorable mention in the category of food quality and safety of the 2010 Nutrition Awards.

<sup>29</sup> Ibersol. 2011. *Sustainability Report*; Ibersol. 2011. *Annual Report*; interviews to a Brand Manager of Ibersol and to the employees. Note that contrary to the activities indicated in the previous page, these CSR activities are undertaken by the Ibersol group, not by any brand in particular.

<sup>30</sup> <http://www.vivabem.pt/>

The Ibersol group aims at offering balanced, diversified and affordable solutions to everyone who seeks a quick meal. Social responsibility is an important part of this strategy, as demonstrated by the CSR activities Ibersol already undertakes.

Though Ibersol is particularly active in terms of social responsibility, the employees have little or no awareness of its activities. When asked about any sort of social responsibility activity undertaken by the restaurants, the collaborators interviewed just mentioned recycling and less than half were aware of Ibersol's partnership with AMI. As the employees are the ones who encourage clients to participate in these activities, this is a main issue for Ibersol. Similarly, none of the consumers interviewed were familiar with the social responsibility activities carried out by any of the Ibersol brands, even though 17 of them pointed out that their opinion of the restaurant would benefit from it.

Furthermore, at least 2 out of 5 interviewees from each restaurant argued that hunger in Portugal is the cause that best fits the brand, not only because it is a cause related to the group's core business, but also because of the increase in poverty in the country, the major cause of hunger<sup>31</sup>. Respondents also mentioned Banco Alimentar Contra a Fome<sup>32</sup> more often than any other NGO. Moreover, consumers are reluctant in donating money because they fear it does not go to the cause, and transparency is considered vital to a successful CSR strategy.

Concerning communication efforts, only 2 out of 25 interviewees (Pizza Hut and KFC's clients) recalled advertising, meaning that communication is not being effective.

All in all, even though consumers do not recall CSR or communication, they share positive associations towards the brands, as aforesaid. Interviewees unanimously argue that firms must act in a socially responsible manner, suggesting that CSR has a positive impact on consumers' perceptions about a brand, as evidenced in the literature (Sen and Bhattacharya, 2003).

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<sup>31</sup>[http://www.worldhunger.org/articles/Learn/world%20hunger%20facts%202002.htm#What\\_are\\_the\\_causes\\_of\\_hunger](http://www.worldhunger.org/articles/Learn/world%20hunger%20facts%202002.htm#What_are_the_causes_of_hunger)

<sup>32</sup> Food Bank Against Hunger.

### **3.5 Insights and Strategy**

The second step of the Creative Business Idea model is the exploration of the intersections between the category, the brand and the consumer. From these intersections results a strategic concept that will guide the CSR communication plan and which represents the final stage of the CBI framework.

#### Category and Brand Intersection:

- Fast Food is the consumer foodservice registering the highest growth
- Social Responsibility is considered mandatory for the category and the brands

#### Brand and Prosumer Intersection:

- Ibersol's employees are not engaged in the company's CSR activities and therefore are not able to communicate them to the consumers
- Consumers and employees have a favorable image of the restaurants; nonetheless feel their opinion would improve if they were aware of any CSR related activities
- Consumers relate the restaurants to friends and sharing
- Consumers value convenience, trade-off quality/price and speed of service
- Consumers believe hunger in Portugal is the cause that best fits the restaurants

#### Prosumer and Category Intersection:

- Consumers are substituting full-service restaurants for fast food and take away services, as they have less disposable income and less time
- Consumers are increasingly concerned with health and the economic crisis
- Consumers are socially and environmentally conscious and ready to drive social good online
- Consumers value concrete social responsibility activities that are close to them
- Consumers fear their donated money does not go to the right place, and believe transparency is key in CSR

These intersections make evidence that Ibersol should develop a communication strategy that leverages on the benefits of CSR in terms of image and social good.

To begin with, the fight against hunger is the social cause that best fits Ibersol. Hunger was the issue most frequently chosen by interviewees, it is connected to Ibersol's core business, it is widely covered in the media, and is not being used by the competitors. In addition, Ibersol can commit to hunger in the long run as there are now more than 300.000<sup>33</sup> people who starve in the country, a number expected to continue to rise.

Banco Alimentar Contra a Fome (BA) is the NGO chosen to partner with Ibersol for several reasons: it is immediately associated to hunger, it has a strong connection to the youth, and is a credible organization. Even though Ibersol has already partnered with AMI, few employees and none of the interviewees remember this link. As AMI is only partially dedicated to hunger, it was considered better to associate Ibersol with a charity with higher fit.

BA aims at fighting food waste, reducing hunger and promoting citizenship and volunteer work. It supports over 300 charities in Portugal in 17 different locations and fed nearly 70.000 people in 2010 with over 600 thousand kilos of food<sup>34</sup>.

In light of these findings, the Creative Business Idea is to alleviate hunger in Portugal in a partnership of national reach with Banco Alimentar Contra a Fome through simple, quick and friendship-focused gestures, which is consistent with the strategy of the brands, as well as consumer's perceptions and values.

The CSR Communication Plan, draws on Kotler and Lee's (2005), Kotler et al.'s (2012) and Rossiter and Percy's (1997) suggested frameworks, which were adapted to CSR, to the CBI framework and to the space constraints.

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<sup>33</sup> [http://www.dn.pt/inicio/portugal/interior.aspx?content\\_id=1732966](http://www.dn.pt/inicio/portugal/interior.aspx?content_id=1732966)

<sup>34</sup> Banco Alimentar Contra a Fome. 2010. *Relatório de Atividades*.



## **4 CSR Communication Plan**

### **4.1 Marketing Objectives and Budget**

The marketing objective of the campaign is to reinforce the brand image of Ibersol as a group and of each brand individually by building a socially responsible reputation while preserving the convenience, speed of service and friendliness that characterize the brands and are valued by the target. Hence, the campaign will establish a stronger positioning<sup>35</sup> for Ibersol, one that is linked to the brand's identity and therefore includes the strategic role of CSR at Ibersol. In the long-term, it is expected that consumers start perceiving Ibersol's restaurants as socially responsible, which would halt sales and average visitations decline.

The conservative estimated costs of the campaign are of 85.000 €<sup>36</sup>. As there was no budget indication from the company or the agency, there were made assumptions based on available information. The estimated costs of the campaign and resource allocation are specified in Exhibit 1 of the present project and in more detail in Exhibit 7 of the Annex.

### **4.2 Target Audience**

The primary target of the campaign are millennials, the 18-26 year old generation, who live in Portugal, care about CSR, are Internet users and visit Ibersol's restaurants frequently. There are about 780 thousand people with these characteristics<sup>37</sup> (Exhibit 2). The secondary target of the campaign are the employees of the restaurants, as they are the ones who can communicate with consumers in the stores, the only offline touch point. The tertiary target are other key stakeholders, such as shareholders, Banco Alimentar, the social solidarity institutions and people helped, potential donors, and the media.

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<sup>35</sup> Kotler et al. (2012:976) define the brand positioning as "the act of designing the company's customer/market offering and image to occupy a distinctive place in the minds of the target market."

<sup>36</sup> Unfortunately, it was not possible to benchmark this value, as costs of campaigns are not publicly available. It is believed that the choice of initiatives and media are within the usual budget, notwithstanding, this value is merely indicative.

<sup>37</sup> According to INE (2010), there are nearly 1.2 million millennials resident in Portugal. To compute the target dimension I used data from INE (2010), Cone Inc. (2006) and my own questionnaire, which will be explored later on.

### **4.3 Communication Objectives**

The campaign will focus on three objectives<sup>38</sup>: to create awareness of the campaign and urge consumers and potential consumers to contribute; to build a favorable brand attitude towards the restaurants, by associating Ibersol to CSR; and to generate brand purchase intention, stimulated directly or through the influence of friends. It also seeks to establish an emotional bond with consumers and to maximize digital communications.

The CSR goals are to raise awareness of the cause and 233.000<sup>39</sup> Euros in food and donations (Exhibit 8 of the Annex), which equals over 77.600 meals, to help mitigating hunger in Portugal. The amount raised will be communicated in all moments of the campaign, in order to reduce consumer skepticism and involve customers in the process.

The campaign will be an 8 weeks program named “Vamos Alimentar Portugal”<sup>40</sup>, which highlights the togetherness of the first-person plural, the cause, and the focus on Portuguese people in need.

### **4.4 Positioning**

Ibersol’s positioning will locate it as a CSR focused brand in the minds of consumers, possible with high cause/brand/charity fit, a committed and transparent campaign, and the establishment of an emotional link with millennials through a shared social concern.

For millenials, “Vamos alimentar Portugal” is a CSR campaign led by five Ibersol restaurants and Banco Alimentar Contra a Fome, that give youth the possibility of fighting hunger in Portugal through small, quick and friendship-focused gestures, because of the straightforwardness and ‘share-ness’ of the program.

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<sup>38</sup> These communication objectives are based on Rossiter and Percy ‘s (1997) model.

<sup>39</sup> Assuming that 10% of customers participate in the C-RM campaign, that the fundraising goals are met, and that 25% of the store employees donate their time volunteering.

<sup>40</sup> In English, “Let’s Feed Portugal”.

#### 4.5 Implementation Plan

From the Corporate Social Initiatives<sup>41</sup> contended by Kotler and Lee (2005), it was decided to propose the implementation of CR-M, Corporate Fundraising and Employee Volunteering, since they are the programs that best meet the marketing and communication objectives, as highlighted in the literature review, and are adequate to the CBI and the target.

The “Vamos Alimentar Portugal” campaign will last 8 weeks, from August 21 to October 16, 2013, the World Food Day. The World Food Day is a global movement that is celebrated every year on October 16, and it is therefore recommended that the program is launched every year in those weeks.

Table IV - Summary of initiatives

Initiatives	Cause Supported	Partnership	Comm. Objective	Primary Target	The offer	Media Vehicle
<b>C-RM</b>	Hunger	Banco Alimentar Contra a Fome	Awareness; Attitude; Purchase Intention	Millennials	Special menu against hunger	Outdoors, Radio, POS, Digital
<b>Fundraising</b>	Hunger	Banco Alimentar Contra a Fome	Awareness, Attitude	Millennials	Crowdfunding to fight hunger	Radio, POS, Digital
<b>Employee Volunteering</b>	Hunger	Banco Alimentar Contra a Fome	Awareness	Employees; Millennials	Employee Volunteering for BA	POS, Digital, Internal Communications

<sup>41</sup> The other Corporate Social Initiatives addressed by Kotler and Lee are Corporate Social Marketing, Corporate Philanthropy and Socially Responsible Business Practices.

#### 4.5.1 Strategy and Initiatives testing

In order to test the proposed strategy, new research was conducted. BA's president Isabel Jonet was interviewed to gather the feasibility of the partnership, as well as employees from each of the 5 restaurants<sup>42</sup>. Both confirmed the suitability of the concept and the initiatives.

It was then conducted a focus group with 6 millennials (Exhibit 9 of the Annex) to understand the underlying motives and obstacles behind donation, as well as to test the strategy and initiatives. The main incentives to donate included the cause chosen, the institution and the donation method; while the main obstacles faced by the participants were complexity and lack of information/transparency about the program. To overcome this, the activities will have to be straightforward, the results constantly communicated, and the credibility added by BA will play a crucial role. The participants of the focus group approved the strategy and believed they would participate in the social initiatives with their friends.

To ensure the results were representative, a questionnaire, answered by 241 members of the primary target (Exhibit 10 of the Annex), was created. Sixty-one respondents were excluded from the analysis, as they did not meet all the filters<sup>43</sup>, therefore yielding a total of 180 observations, from visitors of Pizza Hut (29%), Burger King (15%), Pans & Company (26%), KFC (12%), and Pasta Caffé (9%). The survey provided a high confidence in the initiatives, as the majority of respondents said it was likely or very likely to purchase the menu of the campaign (72%) and to take part of the crowdfunding program (74%). Also, over 75% indicated the initiatives would have a positive or very positive impact on their opinion of the restaurants (C-RM (76%), Fundraising (77%) and Employee Volunteering (81%)).

Furthermore, statistical tests (Exhibit 10.3 of the Annex) were used to see whether there was a statistically systematic relationship between the different variables. Indeed, gender is strongly

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<sup>42</sup> Unfortunately, no one from the Marketing or CSR functions at Ibersol was available to be interviewed.

<sup>43</sup> The filters included living in Portugal for the last two years, being between 18 and 26 years old, having a mobile phone and Internet access, and having been to one of the five restaurants under analysis in the past year.

associated with the choices of restaurants ( $p=0.00<0.05$ ): women choose more Pizza Hut and Pans & Company, while men prefer KFC. Gender is also statistically associated with the likelihood of participating in the Corporate Fundraising initiative ( $p=0.096<1$ ) and with the impact on perceptions of the restaurants resulting from the Employee Volunteering initiative ( $p=0.059<1$ ): while men seem to be more receptive to crowdfunding than women, employee volunteering would have a greater impact on women.

Moreover, the associations between being one restaurant's client and the likelihood of participating in the initiatives or their impact on perceptions of the restaurants are statistically significant<sup>44</sup>, which influences the way the activities should be communicated by each of the restaurants. In fact, KFC and Pasta Caff  's clients are the ones more willing to purchase the campaign menu ( $p=0.097<0.1$ ). KFC's visitors are more willing to contribute to the crowdfunding initiative than others ( $p=0.001<0.05$ ), and the ones to which the initiative would have greater impact ( $p=0.042<0.05$ ), which makes sense considering what was abovementioned concerning the differences in gender. Regarding Employee Volunteering ( $p=0.087<1$ ), KFC and Pasta Caff  's clients are again the ones to whom the initiative would have a better impact on their perceptions.

Contrary to common belief, according to the questionnaire men or the clients of KFC and Pasta Caff   seem to be more sensitive to the Corporate Social Initiatives proposed, a tendency that communication should take into consideration.

Anyhow, the lack of very strong associations ( $p<0.05$ ) between the restaurants under analysis and the three initiatives proposed<sup>45</sup>, highlight that the initiatives recommended are consistent with the five restaurants and answer the briefing given by the agency, which proposed the development of a strategy common to the five restaurants.

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<sup>44</sup> Except concerning the choice of restaurant and the impact of the C-RM initiative ( $p=0.175>0.1$ ).

<sup>45</sup> Except concerning the Corporate Fundraising initiative ( $p=0.001<0.05$  and  $p=0.042<0.05$ ).

#### 4.5.2 Corporate Social Initiatives<sup>46</sup>

##### **Cause-Related Marketing**

The “Vamos Alimentar Portugal” campaign will be linked to a special menu called “Menu contra a fome”<sup>47</sup> that includes the core product of each of the restaurants<sup>48</sup>, which will be sold at a higher price as a limited edition during the campaign period. The additional price of 1€ (in the case of Pizza Hut and Pasta Caffé, which are more expensive) and of 0,50€ (in the case of Burger King, Pans & Company and KFC, which are less expensive) per menu will go directly to eradicate hunger, with the help of BA, and add 200.000€ to the overall fundraising goal. There will also be a loyalty card where the price of the 10<sup>th</sup> “Menu contra a fome” purchased will be fully donated. The loyalty card can be shared among friends.

C-RM can easily be implemented throughout every restaurant, and will help build a positive image of the restaurants, promote sales, and raise a significant amount of funds to the cause.

##### **Corporate Fundraising**

Ibersol will undertake a donation-based crowdfunding program for consumers to pool small amounts of money to fight hunger through a crowdfunding platform<sup>49</sup>. The amount being raised will be shown live on the website so that consumers can see it increase the minute they donate. Donors can share their donations on Facebook, and when 5 friends donate via one friend, they all get the “Menu contra a fome” for free<sup>50</sup>, and Ibersol donates its price. The goal of the initiative is to turn consumers into fundraisers and raise 5.000€ through consumer

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<sup>46</sup> The communication agency Fuel was consulted for the development of the initiatives, and its helpful feedback was included when possible.

<sup>47</sup> In English, “Menu against hunger”

<sup>48</sup> The core product of each restaurant (e.g. Whopper, from Burger King) will be used because it is the most sold, which would increase the probability of purchase. Making a completely new menu would be very expensive.

<sup>49</sup> PayPal will accept the donations, since it is the most quick and reliable existing method. It is believed that most young people already have a PayPal account, which would decrease even more the time spent donating. The fee asked by PayPal is of 2.9% plus 0.30€ per transaction. More information in: [https://personal.paypal.com/us/cgi-bin/?cmd=\\_render-content&content\\_ID=marketing\\_us/fundraise\\_social\\_media\\_app](https://personal.paypal.com/us/cgi-bin/?cmd=_render-content&content_ID=marketing_us/fundraise_social_media_app)

<sup>50</sup> Consumers will receive a coupon than can be printed and redeemed in the restaurants. As this is already done in the restaurants, the employees are already familiar with it.

donations. Ibersol will match all donations up to 50€ per consumer, for them to raise together a total of 10.000€ to fight hunger in the 8 weeks of the campaign.

Besides bringing awareness and generating buzz around the program and the restaurant's commitment and innovation, this action would also expand Ibersol's potential market by engaging friends of fans. It will also leverage on the C-RM initiative.

### **Employee Volunteering**

In order to involve the employees in its CSR activities, it is suggested that Ibersol holds a Volunteering Program with Banco Alimentar. Each employee will be invited to participate in 5 hours of paid time for volunteering (including transportation), where they would collect food for BA. 25% of the employees of the restaurants are expected to participate, henceforth collecting 23.000 Euros in food. The activity is voluntary, but the participants will see their efforts recognized in internal communications, as the intranet and newsletters. A successful initiative would help the cause, develop employee skills and morale, promote the company through the interaction with potential customers and contribute to previously defined goals.

**Banco Alimentar Contra a Fome** will be responsible for associating its name and adding credibility to the initiative. In addition, it will distribute the money raised (that will go directly to BA's bank account) and the food collected to the social solidarity associations and people in need, with whom BA currently works. Furthermore, BA will be responsible for training, managing and allocating the employees. By partnering with Ibersol, BA will benefit from new sources of funding and volunteers (Berglind and Nakata, 2005; Kotler and Lee, 2005), an increase in awareness and visibility (Varadarajan and Menon, 1988), and access to the company's networking and expertise (Berglind and Nakata, 2005; Kotler and Lee, 2005).

### 4.5.3 Media Strategy

#### Media Selection

The media plan will integrate online (website and Facebook) and offline (POS, Radio and Outdoors) communication vehicles to communicate the program and drive consumers to purchase the menu of the campaign, donate and share. The executions should be pretested.

The tone of the message will be motivational and focused on the aid to the less fortunate<sup>51</sup>.

The website will be a crowdfunding platform with a digital billboard showing the progress of the fundraising, as well as critical information about the campaign<sup>52</sup>. The Facebook page will encourage user-generated content and invite consumers to take action by donating and sharing with friends. Integrated, both these channels aim at creating a compelling digital experience.

Concerning offline communication vehicles, POS merchandising material (flyers, leaflets, posters and standups), radio spots in RFM<sup>53</sup>, and Outdoors in shopping centers<sup>54</sup>, will inform and encourage consumers' participation. Finally, Ibersol should develop an internal communications plan so that the employees are fully informed of the campaign.

In the week before the “Vamos Alimentar Portugal” campaign launch, i.e., from the 14<sup>th</sup> to the 21<sup>st</sup> August, 2013, Ibersol will send press releases to the media, to promote the campaign, explain the programs and gain reputation by showing consumers that it is committed to the hunger cause. On the World Food Day, the 16<sup>th</sup> of October, 2013, owned media and press releases will show the campaign results, and let consumers know how their contributions helped people in need, to leverage the previous media efforts.

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<sup>51</sup> E.g. “Por cada menu comprado, a Ibersol dá €1 na luta contra a fome em Portugal”; “Seja parte da solução: ofereça uma refeição a quem mais precisa”

<sup>52</sup> The website will also feature explanatory videos about the campaign and where the money goes, a news feed with posts and activities concerning the campaign, personal stories about the people helped, low-cost recipes, how to become a volunteer of BA and other ways to get involved, links to Ibersol's and the brand's websites, and share tools to spread the message. Additionally, visitors will be encouraged to write online reviews.

<sup>53</sup> RFM is the radio station listened the most by the target. There will be 20-second advertisements in the morning and evening commuting times.

<sup>54</sup> Especially in the ones where the restaurants have more traffic, which are Colombo, Vasco da Gama, Cascais Shopping (Lisbon), and Norte Shopping and Arrábida Shopping (Porto), according to Ibersol.



## Media Scheduling

As aforementioned, “Vamos Alimentar Portugal” will last eight weeks. During the rest of the year, Ibersol should communicate with the consumers on an ongoing basis through social networks to maintain the link created during the campaign.

Table V - Media Scheduling

Months		August	August	August	September	September	September	September	October	October
Weeks		Week 0	Week 1	Week 2	Week 3	Week 4	Week 5	Week 6	Week 7	Week 8
M E D I A	Online Media									
	Website									
	Facebook									
	Internal Comm.									
	Offline Media									
	PR									
	Radio									
	POS material									
	Outdoors									

## 4.6 Campaign Tracking and Evaluation

Tracking the impact of the CSR Communication Strategy implicates economic and non-economic criteria, which should be measured continuously through company calculations and market research (Percy and Rosenbaum-Elliott, 2012). It is essential to isolate the effects of communications to other variables, and to consider competitor’s behaviors when tracking and evaluating the campaign. The criteria, linked to initial objectives, are presented below.

Table VI – KPIs and Success Criteria

Initiatives	Comm. Objectives	KPIs	Measure and Success Criteria
C-RM	Brand Awareness	Awareness levels	Customer Tracking Survey (Exhibit 11 of the Annex)
	Brand Attitude	Improvement in brand attitude	Market research to measure how the brand is evaluated in relation to other brands and before/after the campaign
	Brand Purchase Intention	Meals sold	Estimated 145.000 menus of the campaign sold
		Likelihood of purchasing	Market research to measure the intentions to purchase
		Coupons redeemed	Estimated 72.500 coupons redeemed
		Likelihood of redeeming	Market research to measure the intentions to redeem

<b>Fundraising</b>	Brand Awareness	Awareness levels	Customer Tracking Survey (Exhibit 11 of the Annex)
	Brand Attitude	Improvement in brand attitude	Market research to measure how the brand is evaluated in relation to other brands and before/after the campaign
		Amount raised	Goal of 10.000€
		Website and Facebook visitors and participants	Website and Facebook analytics (estimated visitors on the website and likes in the Facebook page after the 8 weeks campaign)
<b>Employee Volunteering</b>	Brand awareness	Awareness levels	Customer Tracking Survey (Exhibit 11 of the Annex)
		No. of volunteers	Estimated 450 employees participating
		Food raised	Estimated 23.000 kg of food collected

Stakeholder satisfaction (through a comprehensive questionnaire), sales evolution (company calculations), and media coverage (clipping) and exposure (GRPs) must also be evaluated. Finally, the impact of the campaign on the brand image of Ibersol will be measured through a combination of qualitative and quantitative research.

Evaluating the outcomes of the initiatives from the side of the hunger cause will require analyzing the change in awareness and concern of the cause (market research), and whether the total fundraising goals (233.000€), and food collected (23.000 kg) were met. These will allow the campaign to take a corrective action for the forthcoming years.

## 5 Conclusions

It was proposed to improve the brand image of Ibersol and fighting hunger in Portugal by positioning the five restaurants as socially active, while maintaining their strategy.

With a high fit between the business and the cause, and an integrated campaign tailored to the target and consistent with the brands, the Cause Related Marketing, Corporate Fundraising and Employee Volunteering initiatives suggested will make it possible for the group to achieve its dual purpose: to improve brand image and to help fighting hunger in Portugal.

## 6 Limitations and Recommendations

In the future, a more comprehensive sample should be used, as 13 of the 25 interviewees were from Lisbon, most of them with a university degree. This may bias the results, especially because Ibersol is headquartered in Oporto, where most of its activities are conducted. It is worth to mention that even though the questionnaire sample was of 241 members of the target, 53% of them were graduates, which may also influence the results. Plus, the survey was distributed online, which may have excluded from the analysis those consumers who do not have Internet access. In addition, a deeper cooperation from Fuel and Ibersol would have been beneficial, as well as from the competitors and AHRESP<sup>55</sup>, who were not available to participate in the project.

It is suggested that Ibersol incorporates in its Communication Strategy the customer insights that resulted from the marketing research that was carried out for the purpose of this project, improves its SEO and CRM processes and introduces mobile marketing. This would assure the success of the positioning of Ibersol as a CSR focused company, increase the volume and quality of traffic to the website and better engage customers.

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<sup>55</sup> Associação da Hotelaria, Restauração e Similares de Portugal

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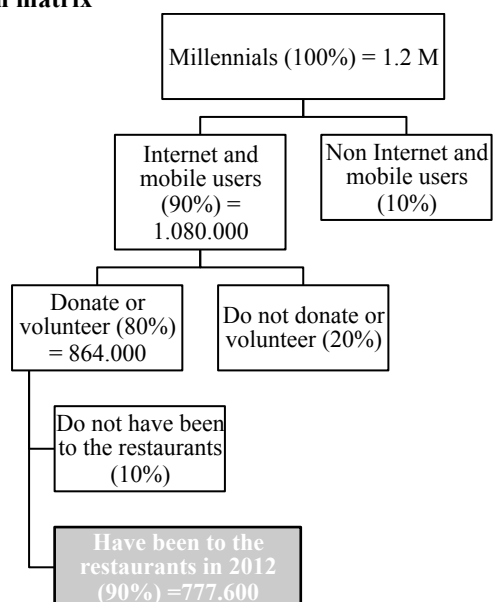
## 8 Appendix

**Exhibit 1. Expected costs of the campaign and resource allocation**

Expenditure	Percentage (%)	Amount (€)
<b>Media</b>		
Website + crowdfunding platform + PayPal fee	12%	10.000€
Facebook (managing the page)	2%	1.500€
Radio	12%	10.000€
Point of Sale material	35%	30.000€
Outdoors in Shopping Centers	24%	20.500€
Internal Communication	0%	0€
<b>Expenditure of corporate resources</b>		
Redemption of coupons	0%	0€
Match the donations	6%	5.000€
Employee paid community service + travel expenses	9%	8.000€
<b>Total Budget</b>	<b>100%</b>	<b>85.000€</b>

Sources: Interview to Pans & Company's Senior Brand Manager; Media price lists (2008 and 2011); Fuel. An explanation of the costs is detailed in Exhibit 7 of the Annex.

**Exhibit 2. Segmentation matrix**



Sources: INE (2010); Cone Inc. (2006); my own questionnaire (2012).